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Montana  
Office of Public Instruction  
Denise Juneau, State Superintendent

## School Finance



### School Elections Deadlines

May is the month for school elections! Please pay careful attention to these upcoming election deadlines:

- **Wednesday, May 21<sup>st</sup>**  
The deadline for trustees to canvass the votes, issue certificates of election and publish results. The canvassed results should be published immediately in a newspaper that will give notice to the largest number of people in the district.
- **Monday, May 12<sup>th</sup> – Monday, May 27<sup>th</sup>**  
Petitions for a recount (when a question submitted to the voters is decided by a margin not exceeding  $\frac{1}{4}$  of 1% of total votes cast) must be filed within 5 days of official canvas.
- **Wednesday, May 21<sup>st</sup>**  
Candidates must complete and file the Oath of Office with the County Superintendent.
- **Wednesday, May 21<sup>st</sup>**  
The deadline for trustees to hold their organizational meeting to elect chair and appoint clerk.
- **Friday, May 30<sup>th</sup>**  
The deadline for requesting the county election administrator to conduct school elections for the ensuing year.

The School Election Calendar and Election Manual are located on the OPI website at the following link: [CLICK HERE](#)

OPI Contact: Janelle Mickelson, (406) 444-3249 or [jmickelson@mt.gov](mailto:jmickelson@mt.gov)

### Quality Educator Payments for FY 2014-15

On February 28, the Office of Public Instruction (OPI) issued Preliminary Budget Data Sheets for FY 2014-15, including the *preliminary estimate* of the Quality Educator Payment (QE Payment) for districts and cooperatives. The QE Payment for FY 2014-15 is based on the number of licensed Full Time Equivalent (FTE) positions employed

at the school or cooperative reported in the Terms of Employment (TOE) module of the TEAMS application as of February 11, 2014.

TEAMS closed March 14, and the OPI recently conducted a FTE review. Any corrections/adjustments, as a result of the review, are currently being processed in MAEFAIRS. The OPI anticipates the adjustment process in MAEFAIRS will be completed by May 9, 2014 and revised data sheets will be issued during the week of May 12<sup>th</sup>.

OPI Contact: Kathleen Wanner, (406) 444-9852 or [kwanner@mt.gov](mailto:kwanner@mt.gov).

### **Important June 1 Deadlines**

All public elementary, high school and K-12 districts requesting approval of additional ANB for funding purposes, must submit form PAA-3 by **June 1, 2014**. Refer to 20-9-313, Montana Code Annotated for a list of the conditions when a district is eligible to apply for additional ANB funding.

- ***Anticipated Enrollment Increase:*** School districts may submit applications for an increase in ANB for FY2014-15 through **June 1, 2014**.
- ***Reopening an Elementary or High School:*** The County Superintendent of Schools must provide an estimate of enrollment for the reopened school for the ensuing year, including a clear explanation or documentation showing the basis for the estimate.
- ***Transition from Half-Time to Full-Time Kindergarten Program:*** School districts that intend to transition from half-time to full-time kindergarten program in FY2014-15 must indicate the anticipated percentage of kindergarten students to be offered a full-time program for FY2014-15 for each elementary budget unit.

Form PAA-3 is available on the OPI website at this link: [CLICK HERE](#)

OPI contact [Nica Merala](#), 406-444-4401

### **Pupil Transportation:**

#### **FY2013-14 Second Semester Reimbursement Claims**

**By May 24<sup>th</sup>**, districts must electronically enter and submit 2<sup>nd</sup> Semester Bus Route Reimbursement Claims (TR-6) and Individual Contract Reimbursement Claims (TR-5) into the Pupil Transportation Program.

Pursuant to ARM 10.7.101 districts must also send the county superintendent one copy of their completed transportation TR-5 and TR-6 claims upon submittal.

***By June 1<sup>st</sup>***, county superintendents must verify and electronically approve district's Bus Route Reimbursement Claims (TR-6) and Individual Contract Reimbursement Claims (TR-5) for 2<sup>nd</sup> semester in the Pupil Transportation Program.

2<sup>nd</sup> Semester Transportation Reimbursements will be disbursed to school districts and counties on June 27<sup>th</sup>.

OPI contact: Donell Rosenthal, (406) 444-3024 or [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

### **Bus Routes and Individual Contracts FY2014-15 Roll Over**

School Districts that are interested, may roll over their Individual Contracts and Bus Routes for FY2014-15 in the Pupil Transportation Program. The process to accomplish this is located under the "Administration" tab in the Pupil Transportation Program.

OPI contact: Donell Rosenthal, (406) 444-3024 or [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

### **New Regulations Regarding Medical Examiner Certificates for Bus Drivers**

Beginning *May 21, 2014* The Federal Motor Carrier Safety Administration (FMCSA) is requiring that all interstate/intrastate commercial motor vehicle (CDL) holders may only have their medical certification or recertification performed by a licensed Ph.D. that is on the National Registry of Certified Medical Examiners (National Registry).

The National Registry ensures that all licensed Ph.D.'s who conduct driver medical certifications have been trained in FMCSA physical qualifications standards and guidelines (49 CFR 390.103).

For more information regarding the new requirement, please click on the following link: [CLICK HERE](#)

The directory of qualified medical examiners can be accessed at the following link: [CLICK HERE](#)

School bus drivers must hold a valid CDL, first aid, and medical certificate in order for a district to receive transportation reimbursement.

OPI contact: Donell Rosenthal at (406) 444-3024 or [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

## **Medical Certification Requirements for Montana Commercial Driver License Holders**

As of May 2012, The Federal Motor Carrier Safety Administration adopted new regulations requiring state driver licensing agencies to add medical certification status and the information on a driver's medical examiner's certificate (previously referred to as DOT card) to their Commercial Driver's License Information System (CDLIS) record.

Drivers who apply for, or renew, a Montana CDL, and Drivers who received notification to submit the Self-Certification form, after April 30, 2012 must comply with the regulations set forth by the FMCSA. The Montana Motor Vehicle Division sends letters notifying Montana CDL holders who have not renewed or upgraded prior to January 30, 2014, with instructions how to submit their self-certification and, if applicable, their medical examiner certificate (MEC). Drivers who do not comply with the notification requirements will have their commercial driver licenses downgraded to a base, Class D license and will no longer be legal to operate any commercial motor vehicle (school bus).

To comply with the new regulations: Drivers must determine the type of business they operate in and certify to that type of commercial operation on the driver license application or Form 21-1201 CDL Self-Certification Classification and Medical Documentation. Based on the self-certification, the driver must provide a current MEC to obtain or keep their CDL.

The self-certification categories include:

- Interstate non-excepted: You are an interstate non-excepted driver and must meet the federal MEC requirements (i.e., you are "not excepted").
- Interstate excepted: You are an interstate excepted driver and do not have to meet the federal MEC requirements.
- Intrastate non-excepted: All Montana-only (intrastate) drivers are required to meet the MEC requirements.

A copy of the new MEC must be submitted to the Montana Motor Vehicle Division prior to the expiration date of the current certificate. This may be done by mailing or faxing a legible copy of the CDL holder's MEC to the Montana Motor Vehicle Division.

Mail To:  
Motor Vehicle Division  
Attn: CDL Help Desk  
P.O. Box 201430  
Helena MT 59620-1430

Or Fax to: (406) 444-1987

Drivers must meet all requirements set forth in MCA20-10-103, and ARM 10.64.201 in order for the district to receive state and county transportation reimbursement. All CDL holders must continue to carry their medical examiner's certificate (formerly referred to as a DOT card).

Other reminders:

- Districts must keep copies of the driver's CDL, Current Medical Certification Card, First Aid Certificate, and TR-35 on file for auditing purposes.
- Random Transportation Desk Audits are selected and performed each Fiscal Year.

OPI contact: Donell Rosenthal at (406) 444-3024 or [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

**Traffic Education Year-End reports (TE06) are due before July 10**

Traffic Education reimbursement for 2013–2014 Traffic Education (TE) Programs is estimated at approximately \$100 per TE student. Reimbursement each year is based on the annual revenue from driver's license fees and the total number of students completing a traffic education course in Montana's public schools. The payment is determined in July of each year for disbursement to schools in August.

To see reports showing payments made to districts in prior years, visit the [Traffic Education Reports](#) page.

TE06 Year-End Reports can be submitted online via the [Traffic Education Data and Reporting System](#) (TEDRS). First check your student count in TEDRS under *Reports, Traffic Education Student Count* to verify that all student lists have been completed and reported to OPI for all traffic education classes with completion dates between July 1, 2013 and June 30, 2014. If the number is not correct, contact the Traffic Education Office right away.

Districts submitting forms via [TEDRS](#) DO NOT need to mail a printed hardcopy of these forms to the OPI.

These required TE forms can be completed and submitted via TEDRS:

- TE01 Program Application -- Due August 1 or BEFORE TE program begins
- TE03/04 -- Due upon completion of each TE class or prior to July 10

- TE06 Year-End Report -- Due before July 10 with program and budget information for annual August TE reimbursement.

Submit the TE06 Year-End Report via the Traffic Education Data and Reporting System (TEDRS). If you need a username to access the system, send your name, phone number, email address and school district name to Patti Borneman. A sample of the TE06 form can be downloaded on the [Traffic Education Forms](#) page. MAEFAIRS and Pupil Transportation users can use their OPI common login names, but need to request access to TEDRS.

OPI contact [Patti Borneman](#), (406) 444-4432

### **Preliminary Allocations for ESEA Title IA and Title IIA**

Preliminary Allocations for ESEA Title IA, Improving Basic Programs and ESEA Title IIA, Improving Teacher Quality grants have been posted to the OPI website. These amounts are for the 2014-2015 school year. While these are the preliminary amounts, final allocations are usually close to the final totals, and they can be very useful in planning for the upcoming school year. If you have questions, please contact the Title I unit. Click on the following link to access the pages: [CLICK HERE](#)

OPI contact [Jack O'Connor](#), (406) 444-3083

### **Montana Society of CPAs Hosts GAAFR Conference**

The Montana Society of Certified Public Accountants will hold a one-day Governmental Audit, Accounting and Financial Reporting (GAAFR) Conference on Friday, May 9, 2014, at the Red Lion Colonial Hotel, 2301 Colonial Drive, Helena, MT 59601. The cost is \$150. The conference is designed for auditors of local governments, including school districts, accountants from city, county, town and school district business officials and representatives of local government governing boards.

For more details and to register for the conference go to: [www.mscca.org](http://www.mscca.org)

### **MASBO 2014 Summer Conference and New Clerks Academy**

The Montana Association of School Business Officials (MASBO) will hold its 2014 Summer Conference and New Clerks Academy in Billings at the Holiday Inn Grand, 5500 Midland Road, on June 16<sup>th</sup>-20<sup>th</sup>. The New Clerks Academy will be held June 16<sup>th</sup> and 17<sup>th</sup>. The Summer Conference will be held June 18<sup>th</sup>, 19<sup>th</sup> and 20<sup>th</sup>. The New Clerks Academy offers two days of valuable information for staff new to the school business office. The Summer Conference is an opportunity to attend quality training focused on school business operations, including payroll, accounting and budgeting.

Both events are excellent ways to network with district clerks and business managers from across the state.

Online registration is available at this link: [Click Here](#)

For more information, contact Denise Williams, MASBO Executive Director, (406) 442-5599 or [dwilliams@masbo.com](mailto:dwilliams@masbo.com).

### **School Finance/E-Grants Summer Workshops**

The Montana Office of Public Instruction (OPI) will be hosting free regional school finance workshops this summer. The workshop series is comprised of two separate all-day workshops: the School Finance Summer Workshop, and the E-Grants Easy Tour Workshop. All workshops will be held in school computer labs; you may bring a personal laptop if desired but please be advised that wireless internet may not be available in all locations.

The School Finance Budgeting and Accounting Workshops will focus on reviewing and providing updates on various issues including, senate bill 191 tuition laws, the Natural Resource and Development K-12 Payment, election laws, and new accounting codes as a result of Governmental Accounting Standards Board (GASB) pronouncements #63 and #65.

The E-Grants Easy Tour workshops allow OPI representatives to assist district staff in the completion of their E-Grants applications for the upcoming 2014-2015 grant year. In addition to the E-Grants Coordinator, there will be a staff representatives present for questions related to Title I-A Basic, Title I-A Schoolwide, McKinney-Vento Homeless, IDEA Part B and IDEA Preschool. We strongly encourage all superintendents, business managers, and/or federal grant program coordinators to attend. Districts should complete most, if not all, of the applications during the workshops.

Please see below for dates and regional locations of all workshops. More details, including registration information, will be forthcoming.

#### **Helena**

July 7: School Finance Summer Workshop

July 8: E-Grants Easy Tour Workshop

#### **Havre**

July 8: School Finance Summer Workshop

July 9: E-Grants Easy Tour Workshop

Kalispell

July 9: School Finance Summer Workshop

July 10: E-Grants Easy Tour Workshop

Missoula

July 10: School Finance Summer Workshop

July 11: E-Grants Easy Tour Workshop

Sidney

July 14: School Finance Summer Workshop

July 15: E-Grants Easy Tour Workshop

Billings

July 15: School Finance Summer Workshop

July 16: E-Grants Easy Tour Workshop

Lewistown

July 16: School Finance Summer Workshop

July 17: E-Grants Easy Tour Workshop

Butte

July 17: School Finance Summer Workshop

July 18: E-Grants Easy Tour Workshop

OPI Contacts: Debbie Casey at (406) 444-3096, [dcasey@mt.gov](mailto:dcasey@mt.gov) or Kate Vatter at (406) 444-7841, [kvatter@mt.gov](mailto:kvatter@mt.gov)

**Useful Links**

*State Entitlement Payments to Schools:* [CLICK HERE](#)

*School Accounting Manual:* [CLICK HERE](#)

*Forms and Publications & Tuition:* [CLICK HERE](#)

*Pupil Transportation:* [CLICK HERE](#)

*Student Count for ANB:* [CLICK HERE](#)

*Audit Information:* [CLICK HERE](#)

*OPI Calendar:* [CLICK HERE](#)



## OPI School Finance Division

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"The Montana Office of Public Instruction provides vision, advocacy, support and leadership for schools and communities to ensure that all students meet today's challenges and tomorrow's opportunities."

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